

## **Pilot No. 8: Document Effective Performance Measurement/Benchmarking/Streamlining Practices**

**Focus:** Performance Reporting

### **Purpose:**

To evaluate usefulness of local performance measurements / benchmarking / streamlining developed and in use by communities and the potential for replicability nationwide.

### **Participants:**

Los Angeles City, CA; Los Angeles County, CA; San Bernardino County, CA; DuPage County, IL; Columbus, OH; King, County, WA; Madison, WI

### **Pilot Description:**

Improving performance measurement and streamlining are major objectives of the CPII. Addressing performance measurement issues is challenging given that the ConPlan encompasses both housing and community development needs. The ConPlan requires grantees to lay out their five-year strategies to address their priorities with CPD, other Federal, State, and local resources. Furthermore, the CAPER must link expenditures and accomplishments back to priorities and strategies identified in the ConPlan. Another challenge is developing meaningful performance measures, beyond program funds expended. Given the challenges associated with performance measurement and streamlining, this pilot will set out to:

- Research existing models for ConPlans, annual action plans, and CAPERS to determine how these model jurisdictions track accomplishments or improve streamlining by using CPD funds and other resources relative to the ConPlan;
- Develop a format for tracking performance based on the models;
- Pilot the revised format in a group of jurisdictions; and
- Evaluate the pilots and make recommendations.

Following are some examples of some pilots that are underway:

- Columbus has developed a chart that displays outcome objectives in its strategic plan and a chart to display the assessment of program year outcomes in the CAPER.
- DuPage County plans to connect specific statements of objectives to outcome measures that are used to evaluate progress and guide priorities for coming year.
- City of Los Angeles has developed a chart to evaluate attainment of goals and objectives and a chart to display outcome priorities and activities.
- Los Angeles County has developed an automated CAPER System for tracking program performance.
- Madison has developed a chart to display results over multi-year period.
- San Bernardino County developed a matrix that cites the statutory and regulatory basis for ConPlan components, and cross references relevant pages within the ConPlan showing where the grantee has met the requirements.

Some CPD grantees have HUD-approved Neighborhood Revitalization Strategy Areas (NRSA), where resources are targeted for maximum impact and effectiveness. NRSAs are similar to the Empowerment Zone/Enterprise Community program in which the grantee establishes its own performance benchmarking to track and evaluate progress toward meeting strategic goals for the area. In return for implementing NRSA initiatives, CPD eases some of the recordkeeping requirements. In addition, HUD's Office of Policy Development and Research will fund an outside assessment of the useful practices.

### **Summary of Grantee Pilots:**

**Los Angeles City, CA** will provide an updated status report of their activity on this pilot.

**Los Angeles County, CA** will use charts to evaluate attainment of goals and objectives and display outcome priorities and activities. They will use their automated CAPER System.

**San Bernardino County, CA** will update and evaluate their "ConPlan Requirements Index" for the Annual Action Plan submitted to HUD May 30, 2003.

**DuPage County, IL** will develop matrices/tables to be used to set goals and objectives for the five year period. The goals and objectives will document activities and benefits (outcomes.) The matrices/tables will be used to measure

and report performance in subsequent years. Grantee will start project August, 2003, and expects to complete the pilot by March, 2004.

**Columbus, OH** will refine and test their useful practice of reporting local accomplishments compatible with municipal performance budgeting and community indicators report. Grantee will also evaluate HUD's proposed notice for development of local performance measurement systems. Grantee plans to end this pilot May 31, 2004.

**King County, WA** will document effective performance measurements tailored to local circumstances and conditions that reflect the views of local stakeholders. The

county has already begun the process of revising its performance measurement indicators, and they will be reflected in the county's proposed new Con Plan format and CAPER submissions.

**Madison, WI** will assess the level of "reader" satisfaction with the website and comprehension of the City's programs. They will update the web pages that describe the City's program accomplishments by goal and by geographic area.

### ***Pilot No. 8 Status as of October 31, 2003***

**King County, WA** developed a Logic Model that measures ways to look at preventing homelessness, ending homelessness, expanding the supply of housing, rehabilitation of housing, infrastructure improvements for small communities to help them meet state comprehensive plan growth management requirements, helping nonprofits with community facility needs, and helping jurisdictions supply affordable housing to all income levels, build support for economic development, increased employment opportunities for low- and moderate income residents, and help maintain or increase the viability of existing industrial and commercial areas.

**Los Angeles County, CA** submitted a new Consolidated Plan for 2003 - 2008 to HUD that used charts to make the Consolidated Plan more results-oriented and useful to communities in assessing their own progress toward addressing the problems of low-income areas. They reduced the number of pages for the section dealing with the Strategic Plan from 114 pages in the 1998-2003 Consolidated Plan to 24 pages in the 2003-2008 Consolidated Plan.

**Los Angeles City, CA** adopted a new Five Year Consolidated Plan for 2003 - 2008 that used HUD templates to make the Consolidated Plan more results-

oriented and useful to participating communities in assessing their County's progress toward addressing the needs of low-income areas.

***San Bernardino County, CA*** included an updated ConPlan Requirements Index in the Annual Action Plan submitted on May 30, 2003.

***DuPage County, IL*** is scheduled to begin its pilot on August 1, 2003. The Field Office needs to provide an updated status report.

***Columbus, OH*** has developed a chart that displays outcome objectives in its strategic plan and a chart to display the assessment of program year outcomes in the CAPER. An updated status report is needed at this time.

***Madison, WI*** has developed a chart to display results over a multi-year period. The Field Office needs to provide an updated status report.